

ONLINE TRAVEL DISTRIBUTION SUMMIT 2016

Direct distribution vs indirect distribution Challenges for the hotel industry.

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The environment within which hoteliers operate has changed dramatically in recent years!



Distribution Trends

Trend #1: Consolidation & Growth Among OTAs

Trend #2: The Rise of New Intermediaries

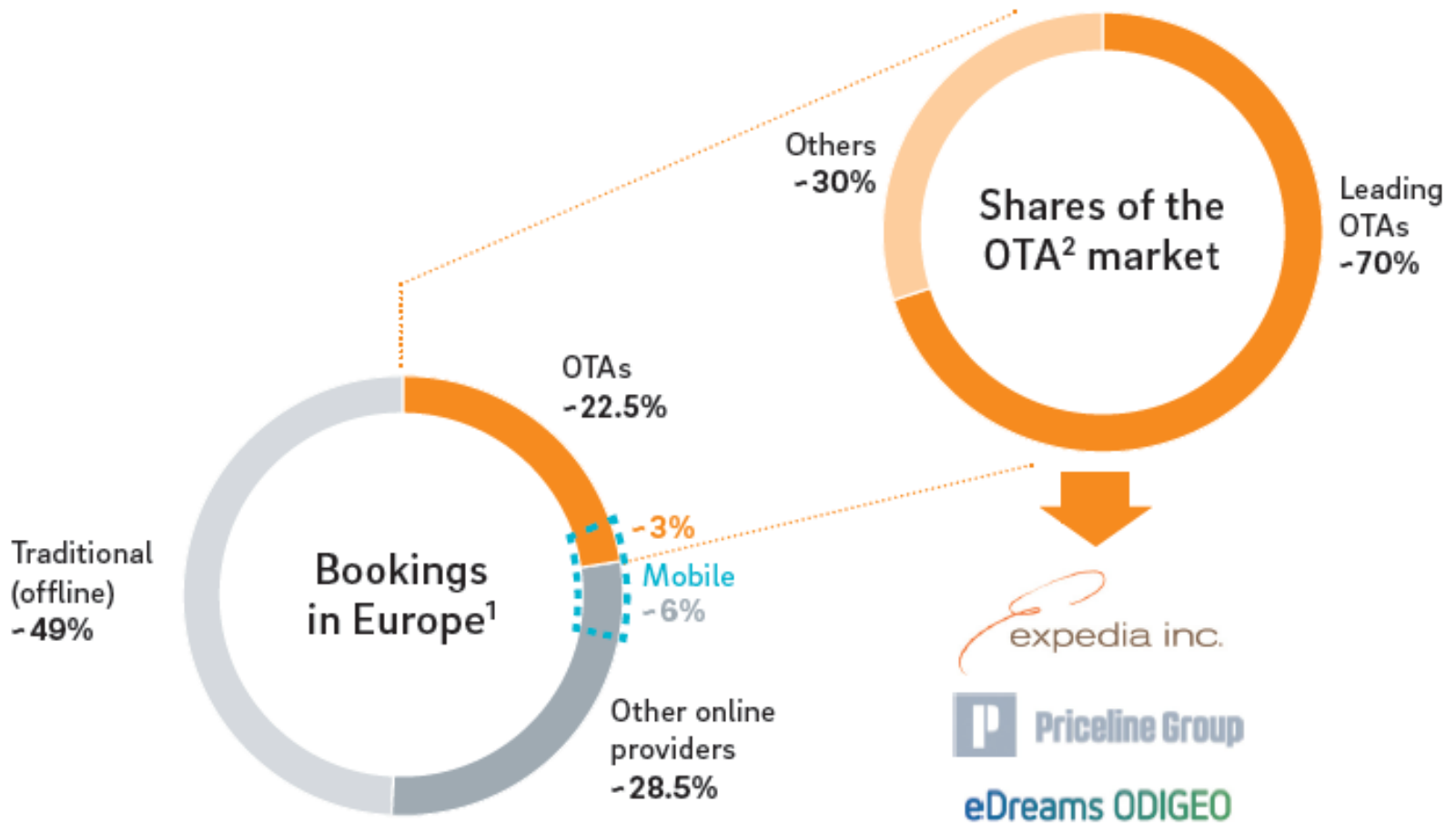
Trend #3: Growth in Mobile Bookings

Europe: Market Share of Distribution

| <i>Weighted overall sample: n=2'169</i> | Market share | |
|---|--------------|-------|
| Direct - Phone | 19.41 | 55.94 |
| Direct - Mail / fax | 2.66 | |
| Direct - Walk-In (persons without reservation) | 5.79 | |
| Direct - Contact form on own website (without availability check) | 5.50 | |
| Direct - Email | 14.91 | |
| Direct - real time booking over own website with availability check | 7.67 | |
| Destination Marketing Organization (DMO) / trade associations | 0.95 | 1.35 |
| National Tourism Organization (NTO) | 0.39 | |
| Tour operator / Travel agency | 9.59 | 16.50 |
| Hotel chains and cooperations with CRS | 1.63 | |
| Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.) | 3.54 | |
| Event and Congress organizer | 1.74 | |
| Online Booking Agency (OTA) | 22.50 | 24.81 |
| Globale Distributionssysteme (GDS) | 1.89 | |
| Social Media Channels | 0.42 | |
| other distribution channels | 1.40 | 1.40 |

Based on results of 25 countries (data from hotel chains in Germany not included).
Market shares in %.

Consolidation

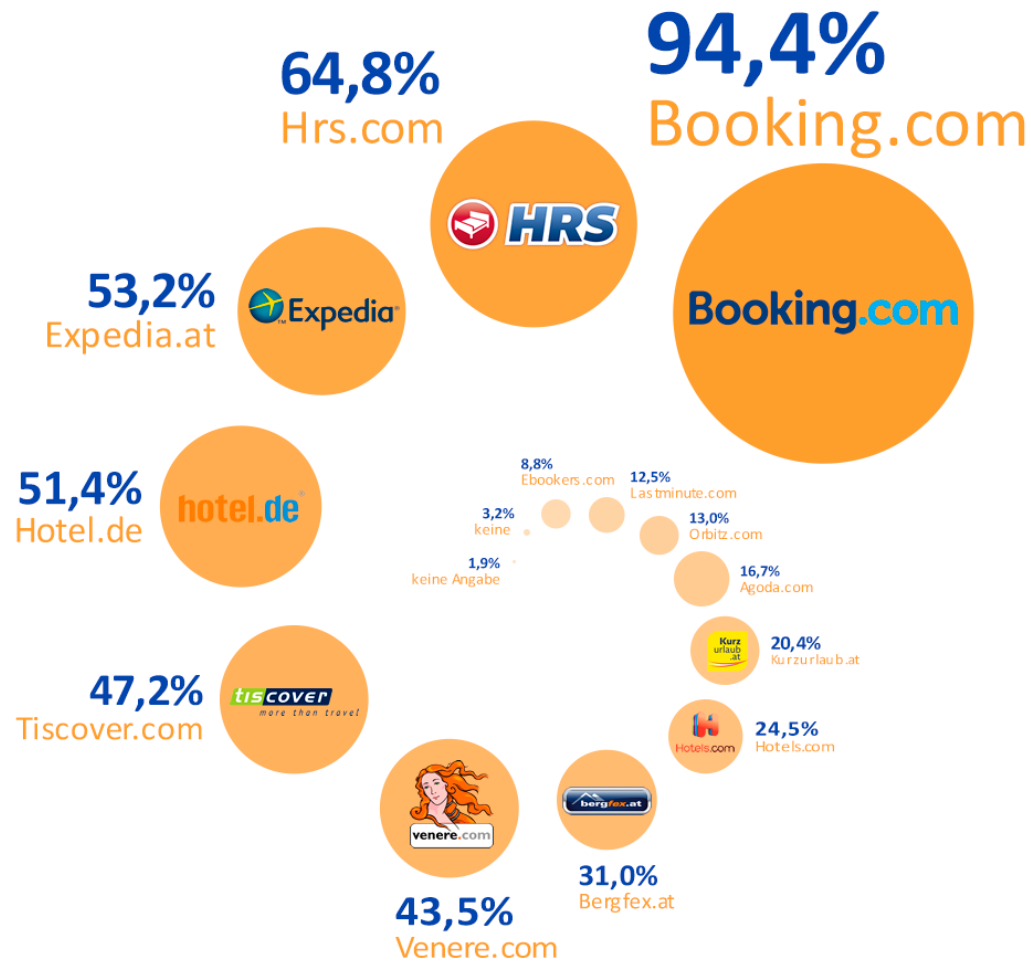


1 25 European countries, weighted

2 Online travel agents

Source: Hotrec, PhoCusWright, Roland Berger

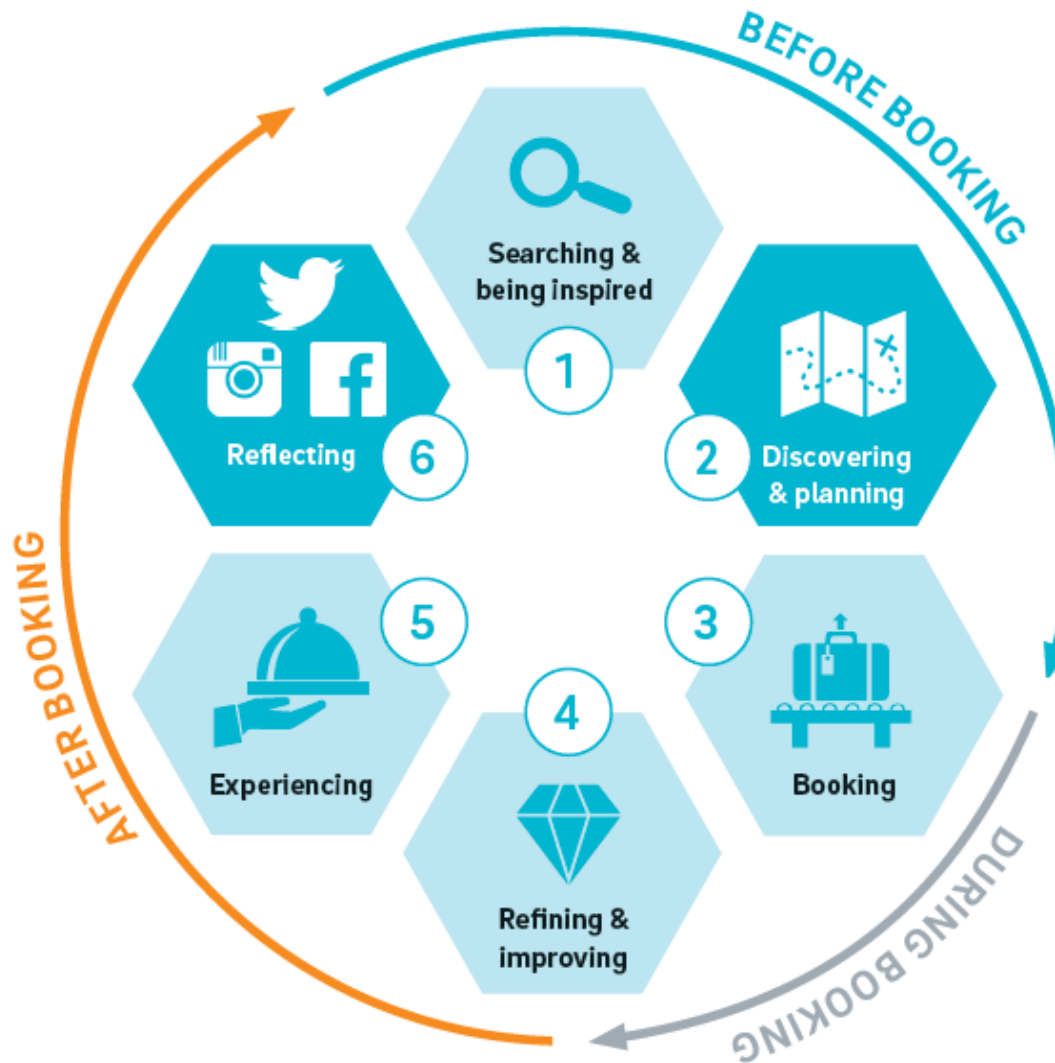
Situation in Austria




N= 204, ÖHV Online-Umfrage 2014, Note 1 oder 2

So are we happy?

It is all about the customer ownership



 Still too few activities

Source: Roland Berger

OTA Management

CHANCES



STANDARDS

It is all about the customer ownership





THANK YOU! BOOK DIRECT!



<http://www.facebook.com/Hoteliervereinigung>